ArborSoftWorx®

Computing Solutions That Work

Customer and Business Management Software

Smart Companies
interested in growing their business
use Smart Software.
They use ArborSoftWorx.

In your Office... In the Field... On the Cloud

www. ArborSoftWorx.com
1-800-49-ARBOR

A Family of Software Products and Services

Creative Automation Solutions, Inc. offers the **ArborSoftWorx** suite of feature-rich software and IT solutions since 1989. ArborSoftWorx runs on Windows, MAC, Linux, Smart devices, Installed or Cloud.

ArborSoftWorx Commercial is specifically designed for the Green Industry and continues to be a leader in providing the most comprehensive **Business and Customer Relationship Management** solutions. Although we focus primarily on the Arboriculture side of the industry many of our users are multifaceted business that provide Consulting, Landscape, Turf Management, PHC, IPM Pest Control and Snow Removal services. ArborSoftWorx will help you effectively and efficiently manage all or any combinations of these lines of business in a single office or multiple branch offices all in one database application.

ArborSoftWorx is a sophisticated database application that enables you to manage unlimited clients, and provides the powerful data access and reporting tools necessary to manage your business. The flexibility of the software allows you to define your *unique* lines of business, service definitions, service resources and more. These entries and settings are used throughout the application to assist in data entry speed and consistency through extensive use of drop down selections and dialogue boxes, ensuring data *accuracy* and *completeness*.

Let ArborSoftWorx improve your business processes, increase the productivity of your sales force, work crews and administrative staff, facilitate the growth of your business, and increase your profitability. To learn more contact us today or visit us at www.ArborSoftWorx.com.

ArborSoftWorx Green Asset Inventory Management (GAIM) is a robust inventory asset management system for Urban Forestry and Asset management, budgets, work orders, Plant Appraisal Calculator, and GIS/GPS mapping on an affordable platform. Municipalities, Consulting and Commercial Arborists use this software with ease to perform street tree and property inventories for efficient management for small townships, communities, parks, schools, golf courses and HOA's. The GIS component has a small footprint, and an affordable price in comparison to other urban forestry management systems that rely on ESRI. It is capable of utilizing ESRI ARCView, Google and Bing Maps, MapInfo, AutoCAD and other file formats.

ArborSoftWorx Earth Resources GIS (ERGIS) is a cost effective, comprehensive, easy-to-use Geographic Information System designed for biologists, ecologists, hydrologists, farmers, foresters, petroleum engineers, and land use planners who might not have any training in GIS.

Although **GAIM** and **ERGIS** are separate product offerings, many of the same inventory data capture capabilities including GPS and GIS are available in **ArborSoftWorx Commercial.**

"Our experience with other "Industry Specific" software was not positive, and as such we were hesitant to make a move to ArborSoftWorx. After the installation and initial personal one-on-one training, we were delighted with our choice. The ArborSoftWorx program is friendly, logical, easy-to-use, and powerful. There are many features we have not used yet, but know that if any software can do it – ArborSoftWorx can! We have been using the system for a little over a year. Our experience has been that the system is stable, it does not "crash", software updates and new release upgrades have gone very smoothly, we have never lost any data, settings, or drawings like we did with the other system. We are very happy with ArborSoftWorx and expect to be loyal software users for many years to come."
– Karen Burns, Owner - Arbor Experts – Dayton OH

Throughout the years we have strived to improve and advance our product offerings and are gratified that the vast majority of our users have continued to trust us with their business computing and Customer management needs. We are honored and proud to say that we have active clients who have been using ArborSoftWorx since 1989!

Increase your staff productivity, save time and generate more income with this easy-to-use, feature-rich suite of software products.

Solid, Stable, and Secure.
ArborSoftWorx is built by professional software engineers using state-of-the-art development tools including an industry leading SQL database, resulting in an industrial strength product. The ArborSoftWorx database boasts a strong level of encryption to secure your data, and has built in access controls that the end-user can define and configure. Your data is your livelihood and should not be stored just anywhere without the assurances of implementation and technology security.

The **depth and breadth** of ArborSoftWorx is attributable to our award winning engineers who are knowledgeable in the latest computer technologies, our tenure in the green industry, our participation with TCIA and various ISA chapters as speakers, and of course guided by our customers.

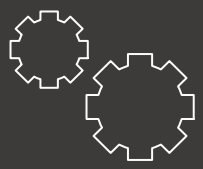
ArborSoftWorx is **priced right** and maintains a low cost of ownership over time.

No matter the size of your organization, ArborSoftWorx is the right size for you. It provides an ease of deployment and **scalability** to grow with the number of users you have today, or may have in the future. You may use some of the product features today, and leave others for tomorrow as your organization grows and matures.

"ArborSoftWorx' "Renewal" feature has allowed us to get our contracts out to existing clients for upcoming seasons faster than ever. It has made it most profitable for us. Support was very responsive with addressing our NY State reporting requirements. – Peter Felix, Tree Health/ Rootgrow, Inc, New York

.

ArborSoftWorx has found a home with organizations both large and small throughout the U.S.A., Canada, Australia, Europe and the Middle East



POWER AND FLEXIBILITY

ArborSoftWorx® has the power and flexibility to meet the demands of a single user office, multiple user networks, secure remote access, as well as multiple branch offices.

FUNCTIONALITY TO INCREASE PRODUCTIVITY

ArborSoftWorx® is full of the productivity enhancing features you expect from an industry specific software program, plus more...

STABILITY AND RELIABILITY

ArborSoftWorx® is built by award winning engineers using state-of-the-art software development tools including an industry leading SQL database, resulting in an industrial strength product.

ArborSoftWorx Commercial

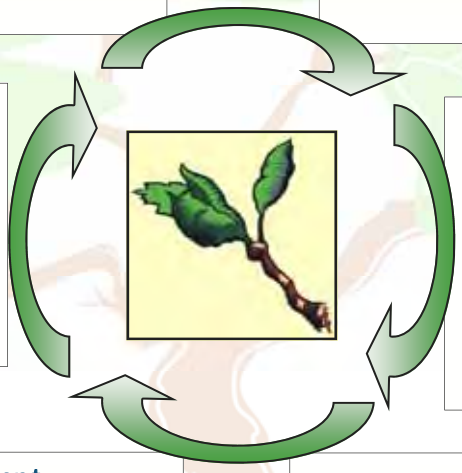
OFFERS ALL THIS...

In your Office...
In the Field...
On the Cloud

Customer
Sales Appointments
3rd Party Billing & Job Sites
Calls/Tasks/Reminders/Memos
Alt. Contacts & Neighbors
Customer Property Inventory
Document Management
Geographic Location Maps
Landscape Sketches and Images

Estimates/Proposals
Meet ANSI A300 Standards
Include Photographs/Images
Landscape Sketches, Property Maps
Contract Renewal Generation
Sales Tracking
includes Service Programs

Business Tools
Personnel Records
TCIA Accreditation Record Keeping
Materials Inventory Control
*DOA/DEC Chemical Reporting
Equipment Maintenance & Inspection



Work Orders
Scheduling & Routing
Geographical Maps
*Route Optimization
Customer/Neighbor Notifications
*Crew Work Check-in
*Crew Time Sheets

Management
Management Reporting
Sales and Customer Analysis
Job Costing & Profit Analysis
Customizable System Settings
Report & Forms Designer
Marketing Tools
Export to Excel, Print to PDF, ...

Accounting
Invoicing, A/R, Statements
Sales Tax calculations & reporting
Cash and Accrual Accounting Methods
Reporting and Export to Excel
*Debt Management – e-pay
*QuickBooks Link Integration

AND MORE...

* See Optional Program Add-Ons

Standard Features

Every business owner wants to be more organized, save time, increase productivity and improve their bottom line.

Customer Management

- Efficiently manage unlimited number of Customers capturing extensive demographics including: multiple e-mail and phone contact information, source and other demographics from the initial phone call
- Access complete customer history from one screen
- Schedule and Track Sales Appointments using the color coded "Drag and Drop" calendar scheduler
- Manage all client documents in one place, Document management allows you to attach ANY type of file and with one -click access, edit, print, e-mail the document
- Manage 3rd Party Billing, Alternate Job Sites, Additional Contacts, Neighbors for Notification
- Perform Comprehensive Property Inventories and Plant Appraisals. Create and maintain inventories for clients, estates, small parks, HOA's and townships with extensive attributes for each item based on ISA standards. Identify condition, grow space, defects, risks and more. Identify maintenance needs to assist Property Managers and Grounds Keepers in planning and budgeting future work.
- Create and attach a property sketch and road map for each job site
- And more...

Proposal/Contract Management

- Create detailed professional Proposals using **ANSI A300** standard unlimited length text service descriptions with the assistance of drop down Services, Service Programs, and a 1200+ editable Woody Plants List.
- Deliver accurate pricing with the aide of the built-in Pricing and Costing tools
- Define service resource needs: crew, equipment, materials, chemicals
- Create CAD style Landscape Drawings and Site Plans and embed them along with photographs and other images
- Generate Contract Renewals with Speed and Accuracy to increase revenue
- Produce NY State DEC Compliant PHC Proposals for regulated applications
- And more...

Work Orders and Job Management

- Scheduling /Routing - use schedulers and report filters to build crew work days
- Print Work Orders by Single or Batch. Include comprehensive driving directions, GPS coordinates, and embedded Microsoft MapPoint detailed maps
- Perform Customer and Neighbor Notifications via phone, e-mail or postal mail
- Include crew specific notes and instructions (Bi-Lingual as needed)
- For PHC and Application type Work Orders may show service history for DEC compliance
- Print Work Orders with a Remittance tear-off to leave with the customer for faster payments
- And much more...

Standard Features

Accounting Management

- Invoicing, A/R, Payments Received, Pre-Payments, Statements
- Support for Multi-level Tax Schedules: based on state, county/parish, or city, and for our non-US users, based on HST, PST, GST and/or VAT.
- Cash and Accrual Accounting Methods supported
- Accept Pre-payments and manage with Job matching
- Numerous standard Aged A/R reports based on 30/60/90, age, Customer type and others, supports export to Excel and PDF
- Process credit cards with the Program Add-on e-Pay Option
- Links to QuickBooks or Reckon Accounting Program Add-on Option

Management Tools, Reporting and Marketing

- "Big Picture" or Detailed Company Overview Reporting
- Sales and Profit Analysis; Detailed Sales and Customer Analysis; Robust reporting with exports to Excel, Print and PDF
- Report & Forms Designer for "Do-It-Yourself" reports
- Marketing Tools: Effectively Mine your data for Marketing with the Powerful "Search and Selector" engine, export for print-house,
- e-mail campaigns, custom mail-merge
- Customizable System Configuration Settings. You define the departments, services, service programs, Tax tables, Routing, Resources and Costing and more.. .that are unique to your business.
- Establish Password controls for individual users program access

Business Tools

- Track and Report Chemical and other material usage for DEC recording and reporting regulations with the Program Add On Site Visitation Option (fulfills NY state requirements)
- Maintain equipment maintenance and inspections including costs
- Inventory Control for Chemicals, Plants, Materials includes Vendor info, order and usage data, last ordered, quantity on hand, and more.
- Maintain accurate records on personnel, training, equipment, client contacts, collections, and more to fulfill TCIA Accreditation record keeping requirements. TCIA Accreditation is fast becoming recognized as the industry standard for Excellence as viewed by your customers and government agencies. TCIA Accreditation may be new to the industry, but it's record keeping requirements have been standard features in ArborSoftWorx for years.

"As the former President of Hartney-Greymont in Needham, I had the pleasure of working with the ArborSoftWorx program and the engineering team of Creative Automation Solutions, Inc. for years. When it was time to branch out on my own, ArborSoftWorx was the clear choice for the Business Management software we would use for our new and growing business. Clearly it works well in this industry for companies both large and small, and growing." James McGuire, Owner – Arbor Specialties, North Marshfield, MA

Standard Features Common

Scheduling & Routing

- Schedule customer appointments and services using the built-in drag-and-drop schedulers with **color-coded routing**. The colors denote the Territory of the Customer site. The Time blocks are defined from the Appointment or Service.
- Service Example: Suppose a Crown Cleaning service is projected to take 3 hours as defined by the Arborist when building the Proposal, then the Time block in the Service Scheduling Calendar would be preset to 3 hours. Simply filter all the pending services for that Territory (Geography), Crew, Service, or other selections, then drag-and-drop those services needed to "Make My Day" for that crew.
- Daily and Weekly displays, Bulk Move of appointments/services from day to day (it rained!).
- Generate reports and listings by a variety of **selections** and **filters**. Send Estimate Requests or Work Orders to any mobile device capable of receiving e-mail with a simple click of the mouse.
- Customize the calendar display settings to suit your needs. Set your work day start and end times, and default appointment and service duration times.

Call, Tasks, Notes

- Quickly enter Call-Back messages, Memos, Tasks and 'To-Do' items using the ArborSoftWorx built-in "Call-Task" feature *from any screen* and eliminate those lost "Phone message" sheets or "post-it" notes. Examples: log Customer Complaints, Collection calls, Sales Reminder, Follow Ups, ...
- Automatically reference general customer information, a particular Proposal/Contract, Invoice or a Receivable record. Enter unlimited text descriptions, and responses. Assign call back owners, priorities, and reminder dates and times.
- Send to *any* SmartPhone, Mobile Device or e-mail address.

LIVE Spell-checker & Customizable Dictionary

- Create accurate descriptions by performing LIVE checking of your text with the integrated Spell-Checker. Add industry-specific vocabulary to custom dictionaries.
- Create Auto-correct pairs for short-cuts and abbreviations that increase your typing speed! Type 'fy' and let the system automatically enter 'front yard', or, type 'PHC' and the system will enter 'Plant Health Care Program' for you. You have the flexibility to create your own auto-correct pairs.

Context Sensitive Help

- With just a click of the mouse receive comprehensive context sensitive help.
- Browse the Help system for specific topics, or search for specific topics.
- Receive step by step instructions that can be viewed on-line or printed.

One-click e-mail PDF Estimates, Proposals, Work Orders, Invoices, Statements

- Single Click Operation to E-mail Proposals/Contracts, Invoices, Statements and other correspondence to your clients or staff using built-in standard PDF format generator.
- Adobe PDF, or other PDF writer software NOT Required.

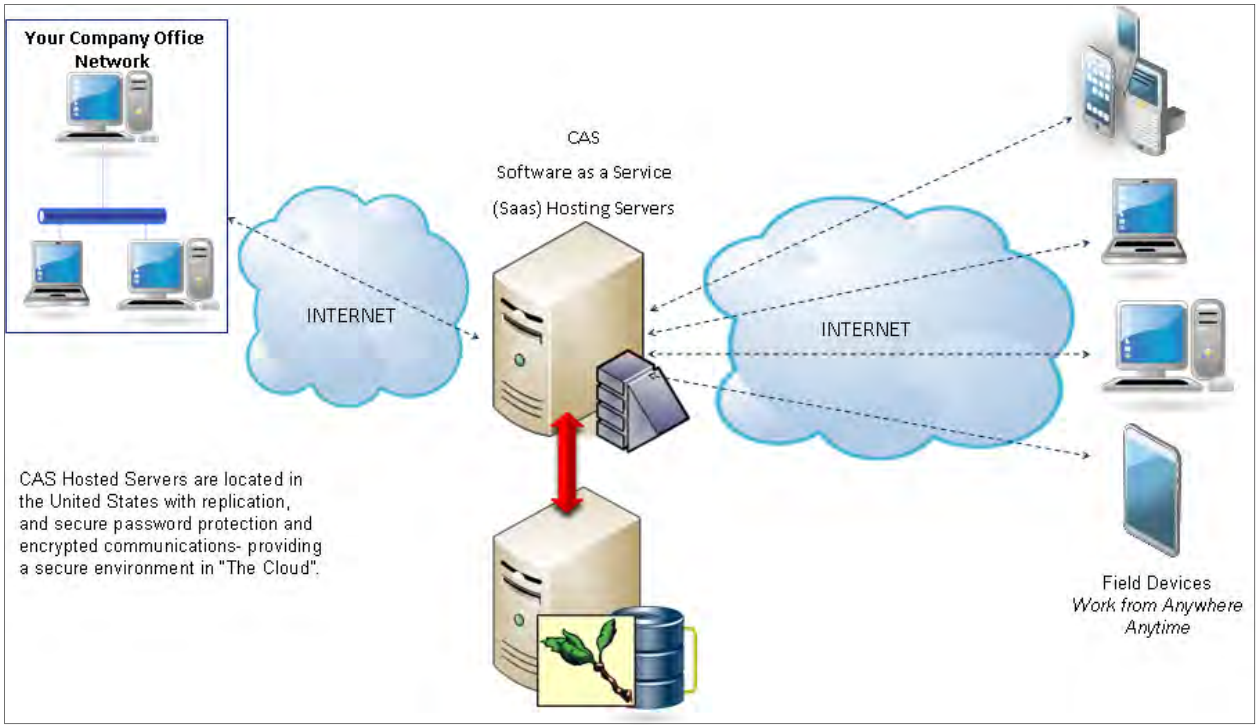
Multiple Branch Office Support

ArborSoftWorx can support multiple office locations or multiple businesses from one database.

Optional Program Add-Ons

Mobile Field Office - "LIVE"
With an Internet connection utilizing state-of-the-art equipment and secure access portals and methods, you can provide LIVE access from any mobile device. Enable field crews, arborists and sales reps to receive up-to-date information and instructions.

Beat your competition by providing a professionally printed Proposal to your client on-site to close the sale!


Your Company Office Network
CAS
Software as a Service
(Saas) Hosting Servers
INTERNET
INTERNET
CAS Hosted Servers are located in the United States with replication, and secure password protection and encrypted communications- providing a secure environment in "The Cloud".
Field Devices
Work from Anywhere Anytime

Mobile Field Office - "DataSync"
For those geographic areas that do not have reliable wireless Internet, you can still save time and reduce data entry in the office by creating Estimates/Proposals in the field using your LapTop (or other Field PC Device), portable printer and the *optional* ***DataSync*** program.

"With our team of Arborists in the field armed with a mix of iPhones, iPADs, MACs, PC Tablets, and portable printers… having the ArborSoftWorx program hosted for us has saved us money, enhanced our goal for faster turnaround of client proposals that are more consistent, timely and accurate. Our office boasts a hybrid of Desktops both Windows and iOS, and we have experienced that their services are always available when and where we need them." - Mike Gaines, CW Arborists, New York

Optional Program Add-Ons

PhoneWorx with Caller-ID Pop-Up

Manage incoming phone calls, task lists and appointments. Works with your telephone company's caller identification (Caller-ID) service.

- Stop wasting time talking to telemarketers. Automatically hang up on specific or unknown callers
- Stop worrying about whether you missed an important call, see who's calling from any computer on a network

PhoneWorx with Voice and E-mail Broadcast Messaging

Send broadcast pre-recorded calls to communicate with an entire selected contact list to:

- Inform clients of an upcoming visit, or application
- Advertise a special promotion or a new service
- Notify clients of overdue invoices
- Stay engaged with your clients.

** Subscription Service Required*

Team Developer

QuickBooks Connector

Let ArborSoftWorx connect to your Intuit QuickBooks or Reckon Accounting system for comprehensive Customer and Invoice data sharing and bi-directional data transfer (*not just journal entries*). Customers and Invoices are automatically added to QuickBooks and balances updated in ArborSoftWorx.

Supports QuickBooks Professional, QuickBooks Enterprise, single and multi-user, U.S.A. and Canadian versions; Reckon Accounting in Australia and New Zealand.

E-Pay Debt Management Solution

ArborSoftWorx offers an E-Pay Solution to make it easy for your customers to pay you. Process credit cards payments when invoices are due and maintain Payment Card Industry Data Security Standard (PCI DSS) compliance.

** Subscription Service Required*

Crew Check-in and Crew Time Sheets

Capture actual time spent on a job, and produce accurate time sheets for crews in the office or in the field.

"Since 2002 we have been using ArborSoftWorx – and it has served us well over the years. We recently took advantage of the Consultation session, and walked away realizing the software could do even more than we imagined, and as a group learned of many of the features, functions and advantages it has to offer. Everyone came away with a good experience. We are excited to bring the lawn care portion of our business into the fold with ArborSoftWorx and have everything in one program." – Bob Good, President/Owner Good's Tree Care, Inc., Harrisburg, PA

Bottom Line. You Demand Results. ArborSoftWorx Delivers.

Optional Program Add-Ons

MapPoint integration for Appointment Scheduling and Service Routing

Never have Sales Reps or Crews lost on the road again! Augment the standard direction-type fields of GPS, Map Code, and turn by turn text directions with area maps of client properties and worksites using Microsoft MapPoint. Maps will appear on Sales Reps Estimate Requests, and crew Work Orders for all jobs.

Zoom-in or out to the customer or job site property address using the altitude selector to get a clear picture of the property location, including cross streets and the surrounding area.

Export selected routes to let Microsoft MapPoint organize the jobs in the most efficient sequence, providing your crews with turn by turn directions to each site.

Enhanced Property Inventory with GPS and GIS Mapping

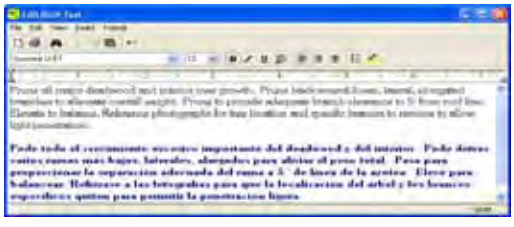
Specifically designed for estates, parks, golf courses, townships and cities with the capability to record Trees and Shrubs inventory using GPS. Enter numerous plant attributes per ISA standards. Includes a Plant Appraisal Calculator.

Use the "AswGIS" Mapping program to provide an interactive GIS Map, or print drawings to include with reports. The "AswGIS" Editor can use ESRI shape files, Google Earth, Bing Maps, some CAD files, to plot the inventory data.

Site Visitation & DOA Chemical Reporting

Configurable Chemical and Disease/Pest databases, comprehensive Chemical usage and inventory reports, and Visitation reports for compliance with **Government Pesticide Use Reporting** requirements are included. New York state and other specific data report formats, and electronic export functions are included.

Bi-Lingual Text Translator



Have Spanish speaking crews or customers? Easily translate Proposal and/or Work Order descriptions to Spanish. This is the ultimate translation tool, necessary for today's bi-lingual work force. Other Language Pairs are available.

"...I struggled with the lack of depth and fundamental functionality of *"other" Arbor* software. The vast and extensive features of your ArborSoftWorx product, your quick and accurate support answers, extensive knowledge of the arboriculture industry, general business practices and product capabilities were fundamental in getting my data converted and my system up and ready for the busy Spring season." "... If a company is interested in accurate data, truly mining their data for business growth, ArborSoftWorx is the robust tool that every business owner should have." -Bill Nestor, Arborfolia, Canada

Product Support Plans

We understand that you are an expert in your profession, not in software and Computer IT Systems. When you have questions, you need an answer immediately. ArborSoftWorx Hotline services will be there to assist you.

Each day we handle over 90% support calls *live*, so you don't have to endure call-backs or two hour waits on hold. When you call, you will be talking to the actual designers of the software. Our support staff consists of degreed professionals with real-world experience. No one can support you like the actual designers of the software.

In addition to our telephone technical support, we also offer e-mail, fax and internet services for your assistance. Product updates can be downloaded from our web site. An Installation Startup Manual and extensive on-line Help and electronic User's Manual.

We will never ask you to "watch a video", we would rather talk to you! By talking directly to our clients each day, we are in tune with what they want, and new industry trends. As a result, many of our product enhancements are ideas that come from our clients. We understand your business and ArborSoftWorx was built for it.

Remote Support

Our support technicians use a secure on-demand Web based portal to provide remote support. This portal enables our technicians to work with you on your computer to assist in training and troubleshooting, or to provide software version upgrade services. All you need is a connection to the internet. We can not access your system without your permission, or without your accessing the web portal first.

On-Site Training and Consultation

ArborSoftWorx is an easy-to-use software product that does not require formal training. However, many of our customers have found an immediate gain in productivity after receiving an on-site, custom designed class. We provide **Customized training** classes for you and your staff at are provided at your facility by one of our training specialists. They will customize a training plan specific to your business, and level of computer software knowledge.

Our training specialists are **knowledgeable in the green industries**, computer hardware, software installation, and general business practices. Our training specialists, who are comprised of certified instructors, and college teachers, can develop and deliver at your office customized educational programs for your organization and staff.

"The ArborSoftWorx program has so much to offer, and we do use a lot of what the program offers. We receive regular program updates and upgrades – that all work smoothly, and we take advantage of on-site consultation sessions. With each we learn that we can do so much more with the software program than we imagined. We are very excited about the many productivity enhancements in the latest release, and future releases." - Sam Adams, General Manager, Cortese Tree Specialists Inc. – Knoxville, TN

Implementation Roadmap

With ArborSoftWorx, you get more than just software and phone support — you get unmatched software and computer expertise, world-class services, and a single vendor relationship—which means you can count on success. We are active in the industry, listen to our customers, and innovate on their behalf when we deliver solutions.

The ArborSoftWorx Implementation Roadmap offers a complete set of services to assist you with your software implementation. The roadmap is based on proven methodology, derived from the insights and experience of our consulting and from customer feedback.

Our degreed consultants, seasoned with years of experience in the green industry and in business, will make sure the implementation aligns with your business growth plan.

ArborSoftWorx has found a home with organizations
both large and small throughout the U.S.A., Canada,
Australia, Europe and the Middle East

www.ArborSoftWorx.com
Sales@ArborSoftWorx.com

Sales: 1-800-49-ARBOR
Support: 1-410-461-5858

Creative Automation Solutions, Inc.
Woodstock, MD U.S.A.
www.creativeautomation.net

MEMBERS OF:
Tree Care Industry Association
International Society of Arboriculture
Society of Municipal Arborists
Society of Commercial Arborists
Mid-Atlantic Chapter ISA
Maryland Arborist Association
Penn-Del Chapter ISA

MEMBER

MEMBER

Creative Automation Solutions and ArborSoftWorx are registered trademarks of Creative Automation Solutions, Inc.
QuickBooks and the QuickBooks logo are trademarks of Intuit, Inc., displayed with permission.
All other trademarks registered by their respective Corporations. **Copyright ©2013 Creative Automation Solutions, Inc.**
This document is protected by domestic and international copyright laws. All Rights Reserved.